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# Example of Client Analyst Job Description

Our innovative and growing company is searching for experienced candidates for the position of client analyst. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for client analyst

* Update central database of key client data
* Work on special projects for global client management
* A team player who can work closely with people at all levels and challenge others
* Able to work with stakeholders in multiple location
* Experience with manager due diligence, portfolio construction, implementing investment strategy
* The delivery of CTLA services to the assigned clients
* Being the single-point-of-contact
* Preparing reconciliations on purchase orders, invoices, statements, checks
* Ensuring that all adviser changes made on OneVue are also updated on CRM
* Taking inbound calls from investors and financial advisers and ensuring that optimal customer service is provided

## Qualifications for client analyst

* Experience in KYC and AML, including knowledge and understanding of US AML / BSA laws and regulations
* Bachelor's degree with a preference for Management Information Systems, Finance, Accounting or Business Administration or equivalent work experience
* Basic SQL and/or equivalent database experience
* Undergraduate degree required, graduate or advanced degree preferred
* Demonstrated ability to multi task and quickly respond to requirements of multiple business units (i.e.,Retirement and Home Office support) establish and maintain positive relationships with these entities
* Reporting to internal and external stakeholders at varying periods on our Investment Funds and investor accounts